myHR

Employee User Guide (Expenses)

Human Resources

Financial & Legal Services

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Overview

Employee Self Service (ESS) and Manager Self Service (MSS) provides managers and staff with the ability to update personal details, view payslips and book annual leave via a secure web-based portal called myHR, saving unnecessary paperwork and administration.

e-Expenses is a module contained within myHR which allows staff to record their expenses and submit for manager authorisation electronically.

The e-Expense module is to be used for claimed expenses. Fees for additional work, which have previously been claimed on the Fees and Expenses Form (Fin1A,) will, for the foreseeable future, continue to be claimed via the paper copy Fin1A.

Policies governing usage

This portal contains personal data about staff. Before accessing, you must make sure you are familiar with your obligations under the University's Data Protection Policy and the University's IT policies.

In addition, e-Expenses is also subject to our own internal policies and procedures, as well as governance and restrictions issued by HMRC. These include, but are not limited to:

- Financial regulations
- Travel, subsistence and other expenses policy
- Entertainment-related expenses and hospitality

The data contained in this portal must not be downloaded, copied or stored on any unsecure (unencrypted) device.

Environmental Impact

The e-Expenses module is an invaluable tool to the University to enable us to measure and manage our carbon footprint caused by travel. Please support this initiative by providing as much information as possible when claiming expenses for mileage or other travel, including vehicle and fuel type or airport codes.

Help

We hope that both ESS and MSS are intuitive and straightforward to use. This guide will lead you through some key functions. However, if you require further assistance, please email myHRsupport@mmu.ac.uk.

Feedback

The system has been designed through extensive consultation and has been thoroughly tested. However, we recognise that there is always room for improvement and we are glad to hear any suggestions. If you have any suggestions for improvements or enhancements please email feedbackonmyHR@mmu.ac.uk.

Employee Self Service (ESS)

Logging in and out

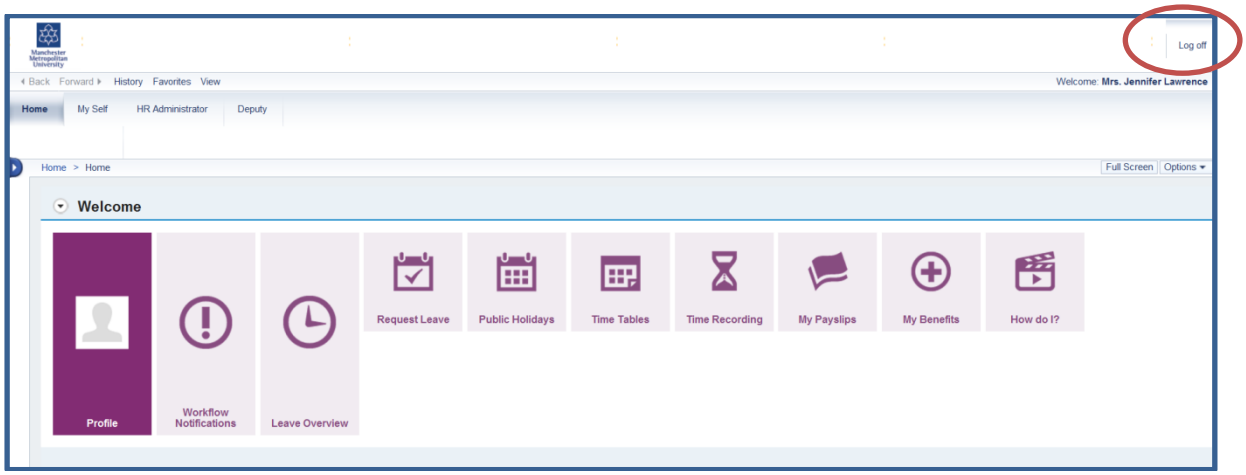
To log on to **myHR,** Click on the **myHR** icon on your desktop.

Logging in is straightforward – just enter your usual MMU credentials in the boxes.

Manchester Metropolitan University
myHR
MMU ID *
55112034
Password *
Log On
Input your usual MMU log in details here, then click Log On.
This portal contains personal data about staff. Before accessing, you must make sure you are familiar with your obligations under the University's Data Protection Policy at: Data Protection Policy and the University's IT policies at: IT Policies. [The data contained in this portal must not be downloaded, copied or stored on any unsecure (unencrypted) device].

Logging out is equally easy. Just click 'Log off' in the top right hand corner from any page. You will be prompted "Are you sure you want to log off?" (to ensure you don't click this by accident).

The system will automatically log you out after 15 minutes of inactivity.

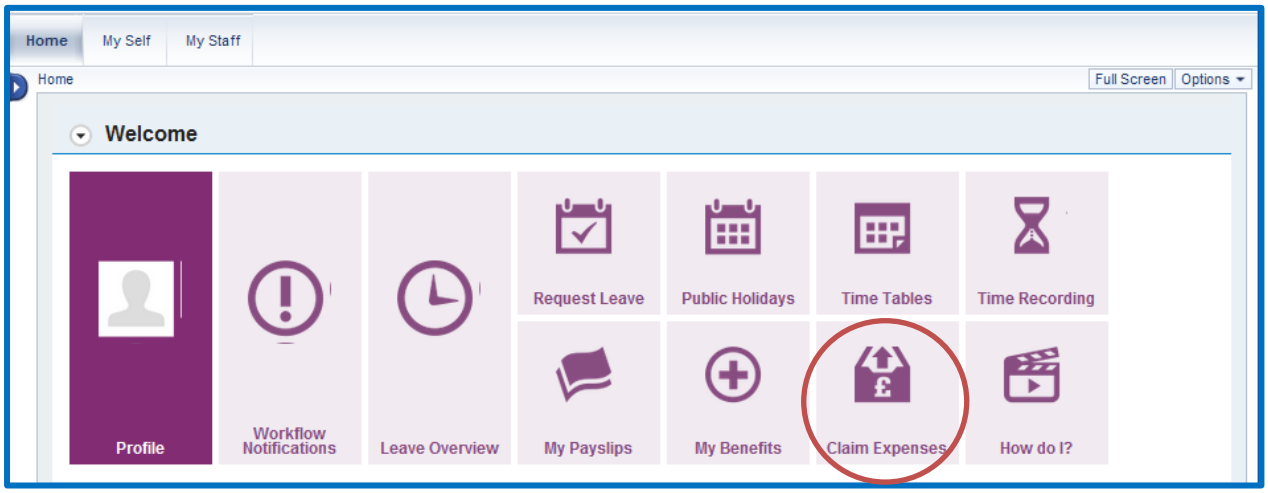


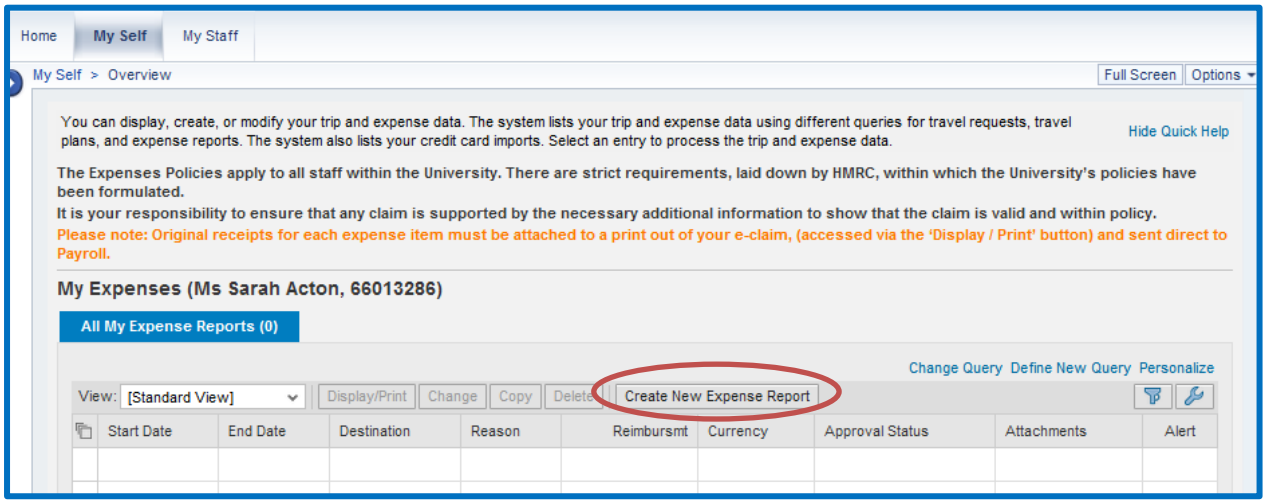
The Home Page

When you log in, you will go straight to the Home page, which has quick links to many of the key features of myHR. All staff will see the top section in purple. Staff with line management responsibility will also see the bottom section in blue, which allows you to respond to requests from your team, run reports and nominate a substitute to handle certain functions on your behalf.

To manage your expense claims, click on the “Claim Expenses” icon, and then “Create New Expense Report”.

A new window will appear. You may need to disable your pop-up blocker to ensure you see the new window.




Home
My Self
My Staff
My Self > Overview
Full Screen
Options
You can display, create, or modify your trip and expense data. The system lists your trip and expense data using different queries for travel requests, travel plans, and expense reports. The system also lists your credit card imports. Select an entry to process the trip and expense data.
Hide Quick Help
The Expenses Policies apply to all staff within the University. There are strict requirements, laid down by HMRC, within which the University's policies have been formulated.
It is your responsibility to ensure that any claim is supported by the necessary additional information to show that the claim is valid and within policy.
Please note: Original receipts for each expense item must be attached to a print out of your e-claim, (accessed via the 'Display / Print' button) and sent direct to Payroll.
My Expenses (Ms Sarah Acton, 66013286)
All My Expense Reports (0)
Change Query
Define New Query
Personalize
View: [Standard View]
Display/Print
Change
Copy
Delete
Create New Expense Report
Start Date
End Date
Destination
Reason
Reimbursmt
Currency
Approval Status
Attachments
Alert

Before you start…

A few handy hints to get your started:

- You can only generate one expense report per date or period. This means that if you have several claims to make for one day (e.g. mileage and parking), you should include those in the same report.
- If your claim is not to be charged to your main cost centre, know the details of the cost centre or WBS codes that the claim needs to be charged to.
- You cannot claim for expenses until they have actually been incurred. For example, you can only claim mileage once the trip has been made, you cannot claim in advance. However, you could save an expense claim as a draft, and then submit it to your manager once the expense has been incurred.
- If you need to make an amendment, that’s fine. However, you’ll need to edit the original submission (even if it has already been paid) – you can’t just submit a new trip with the additional item.
- Have your original receipts to hand, ready to attach to the Expense Summary Statement which you can print once you’ve completed your claim. You will then attach your receipts to the statement and

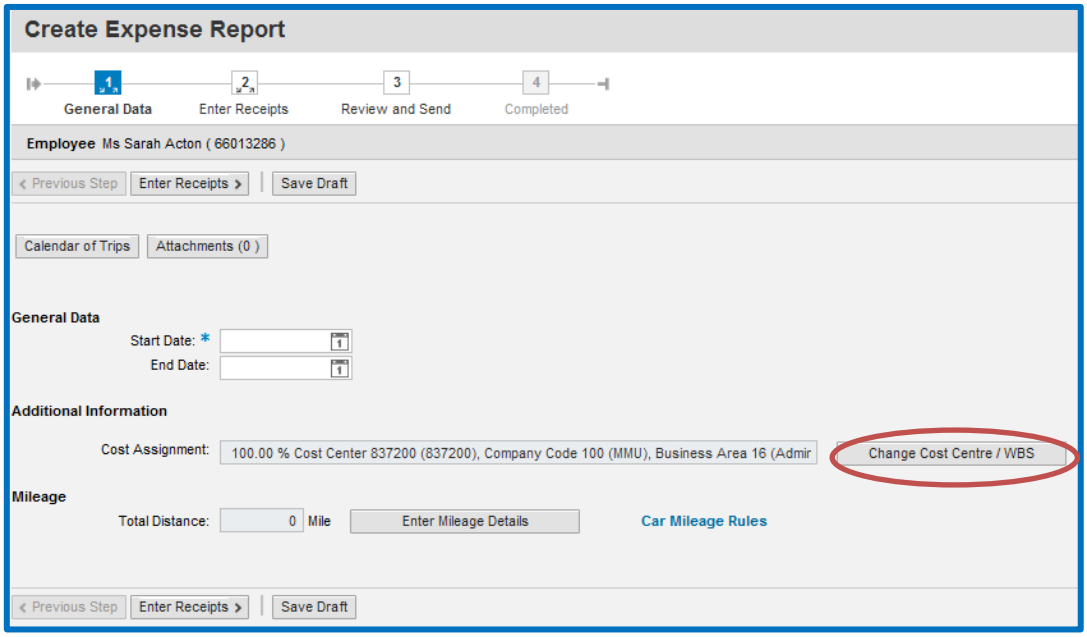
forward them to Payroll (Room 301, All Saints Building). Your manager may ask to see receipts before they are sent to Payroll in line with the policy in place within your department. Please check with your manager if you are unsure.

- The receipt dates must correspond to the trip dates (unless there is a good reason why not, for example, a hotel paid in advance).
- HMRC rules stipulate that credit card and debit card slips and bank statements are not acceptable as receipts. Please do not substitute these documents for original receipts, as it will result in your whole claim being returned for correction.
- Expenses will be reimbursed in the first available payroll after both the following have been met:
    - Manager approval via myHR
    - Where applicable, original receipts and Expense Summary Statement received and checked by Payroll.

Changing your cost centre

The cost centre for your claim will default to the budget where your salary is charged.

If the whole of your claim is to be charged to another cost centre or WBS, then this can be changed on the screen below by clicking on the Cost Centre/WBS field.



If individual items of the claim are to be charged elsewhere, the Cost Centre / WBS can be changed against individual line entries as the claim is completed.

Claiming mileage

To claim mileage for business-related travel, enter the dates of travel into the General Data section. You can do this quickly by clicking on the small calendar icons.

Read the mileage section of the Travel, Subsistence and Other Expenses Policy available on the Financial and Legal Services website to ensure you are fully up to date with any recent University or HMRC changes.

First 50 Miles and Beyond First 50 Miles

The first 50 miles of a journey leg are paid at a higher rate; miles beyond the first 50 are paid at a lower rate. The rates are reviewed annually and the current rates can be viewed in the Travel, Subsistence and Other Expenses Policy.

A single journey is from point A to B. If, in any one trip, visits are made to more than one site, e.g. from All Saints to Crewe, Crewe to Stoke, then Stoke back to All Saints, the claim should detail each leg of the journey.

Therefore, if you are claiming a return trip from Crewe to All Saints, you would enter 38 miles each way, and each leg would be paid at the higher rate.

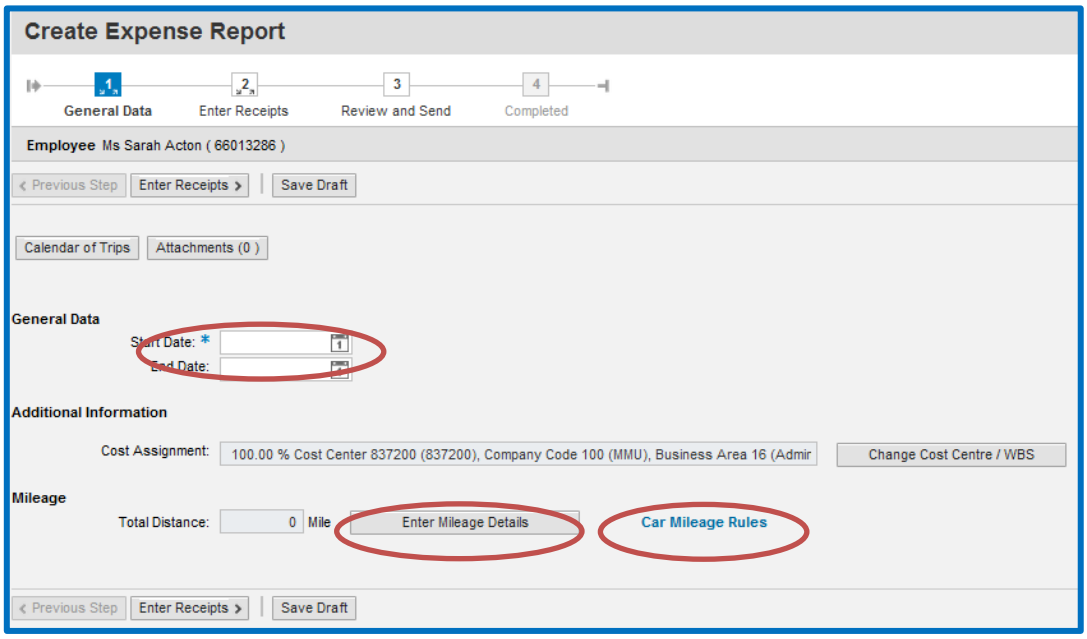
However, if you are travelling from All Saints to Birmingham, you would need to enter:

All Saints – Birmingham – First 50 Miles
All Saints – Birmingham – Miles Beyond First 50
Birmingham - All Saints – First 50 Miles
Birmingham – All Saints - Miles Beyond First 50

A link to guidance on approved miles to and from University sites is contained within myHR.

Entering your claim

Complete the date fields in the window below, and then click Enter Mileage Details.

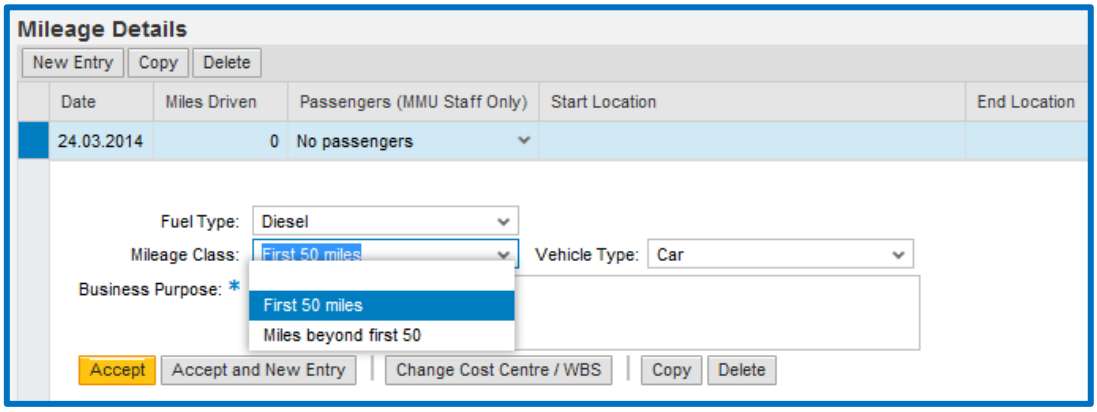


Select the fuel and vehicle type. Then, select Mileage Class (e.g. First 50 Miles or Miles Beyond First 50).

In this example, the claim is for a trip from the All Saints Building to the Birmingham NEC for a conference. There was one passenger. Please note that you can only claim mileage for passengers which are MMU employees. You cannot claim for students or any non-MMU employees.

The business purpose would include the reasons for travel, for example, “Travel to [name of] conference” or “To attend meeting with [name] at [organisation/place] regarding [subject]”.

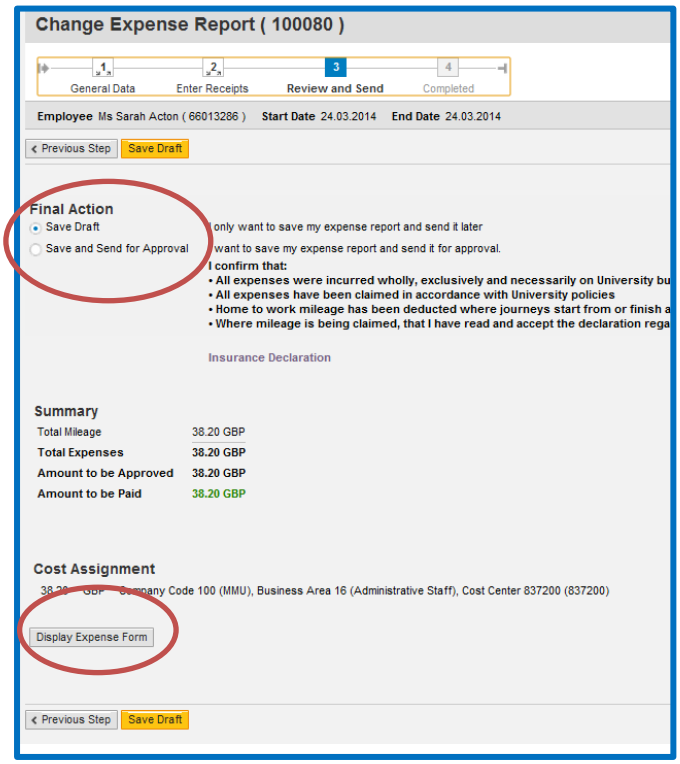
In addition to the full business purpose, please ensure you enter the name and MMU ID of the passenger you are claiming for.



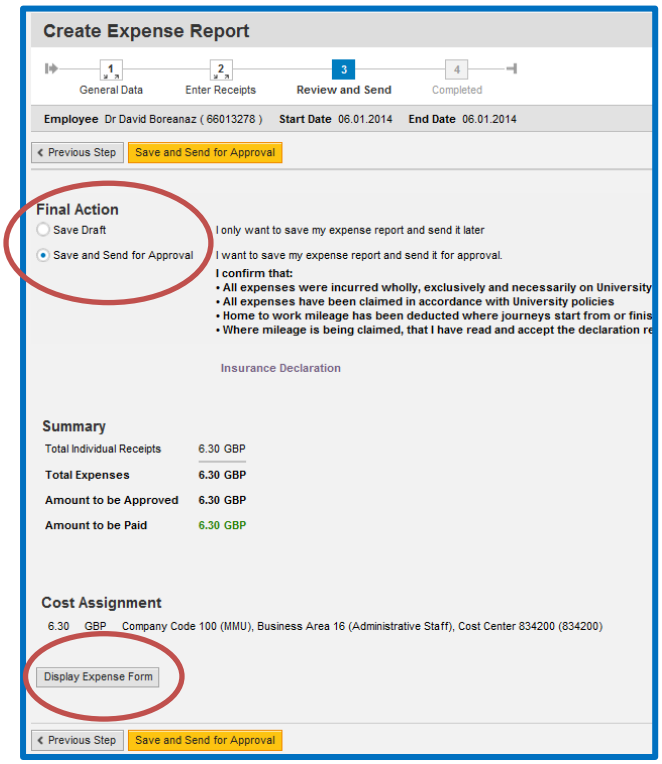
There is no need to enter receipts for mileage claims, however for all other expense claims you will be required to send original paper receipts to Payroll, attached to the Expenses Summary statement.

Therefore, skip the “Enter Receipts” screen and go straight to “Review and Send”. To save the claim as a draft, click Save Draft at the bottom of the screen. If you wish to send the claim straight to your manager, select “Save and Send for Approval” under the Final Action section.

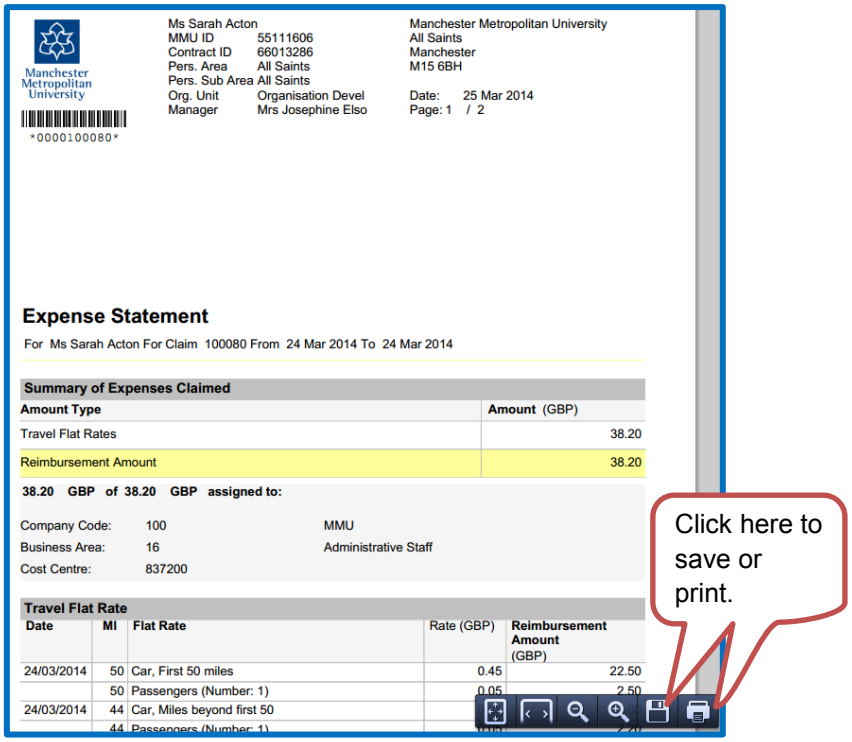
Save as draft


Change Expense Report (100080)
General Data
Enter Receipts
Review and Send
Completed
Employee Ms Sarah Acton (66013286) Start Date 24.03.2014 End Date 24.03.2014
Previous Step
Save Draft
Final Action
Save Draft
Save and Send for Approval
I only want to save my expense report and send it later
I want to save my expense report and send it for approval.
I confirm that:
• All expenses were incurred wholly, exclusively and necessarily on University bu
• All expenses have been claimed in accordance with University policies
• Home to work mileage has been deducted where journeys start from or finish a
• Where mileage is being claimed, that I have read and accept the declaration rega
Insurance Declaration
Summary
Total Mileage 38.20 GBP
Total Expenses 38.20 GBP
Amount to be Approved 38.20 GBP
Amount to be Paid 38.20 GBP
Cost Assignment
Company Code 100 (MMU), Business Area 16 (Administrative Staff), Cost Center 837200 (837200)
Display Expense Form
Previous Step
Save Draft

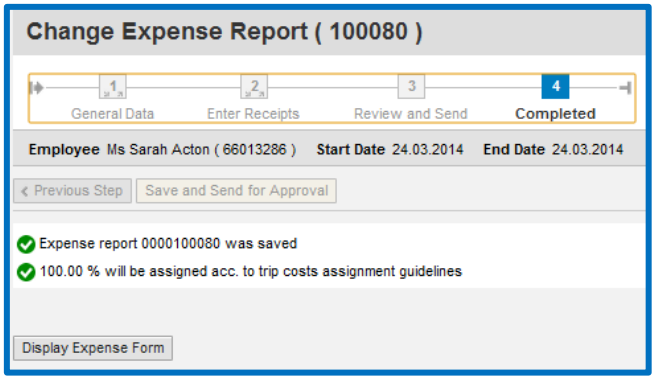
Save and send for approval


Create Expense Report
General Data
Enter Receipts
Review and Send
Completed
Employee Dr David Boreanaz (66013278) Start Date 06.01.2014 End Date 06.01.2014
Previous Step
Save and Send for Approval
Final Action
Save Draft
Save and Send for Approval
I only want to save my expense report and send it later
I want to save my expense report and send it for approval.
I confirm that:
• All expenses were incurred wholly, exclusively and necessarily on University
• All expenses have been claimed in accordance with University policies
• Home to work mileage has been deducted where journeys start from or finis
• Where mileage is being claimed, that I have read and accept the declaration re
Insurance Declaration
Summary
Total Individual Receipts 6.30 GBP
Total Expenses 6.30 GBP
Amount to be Approved 6.30 GBP
Amount to be Paid 6.30 GBP
Cost Assignment
6.30 GBP Company Code 100 (MMU), Business Area 16 (Administrative Staff), Cost Center 834200 (834200)
Display Expense Form
Previous Step
Save and Send for Approval

When saving or submitting your expense claim, you can display the expense form. This appears as a PDF in a new window, and contains all the information relating to your expense claim. You can save or print this, by hovering over the PDF and using the icons. However, it will always remain visible in your myHR area.



When you have submitted your expense claim, you will receive a notification to confirm that the expenses have been sent to your line manager for authorisation.

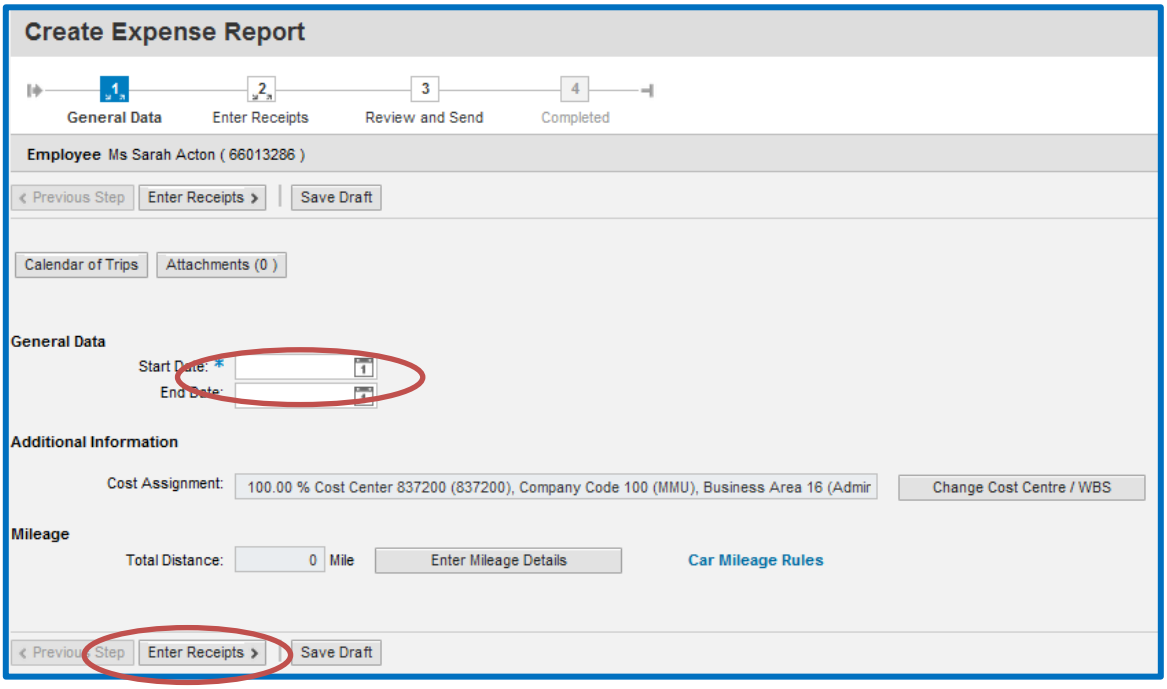

Change Expense Report (100080)
1 General Data
2 Enter Receipts
3 Review and Send
4 Completed
Employee Ms Sarah Acton (66013286) Start Date 24.03.2014 End Date 24.03.2014
Previous Step
Save and Send for Approval
Expense report 0000100080 was saved
100.00 % will be assigned acc. to trip costs assignment guidelines
Display Expense Form

The Expense Statement, along with any receipts, must be sent to Payroll. Your manager may ask to see receipts before they are sent to Payroll in line with the policy in place within your department. Please check with your manager if you are unsure.

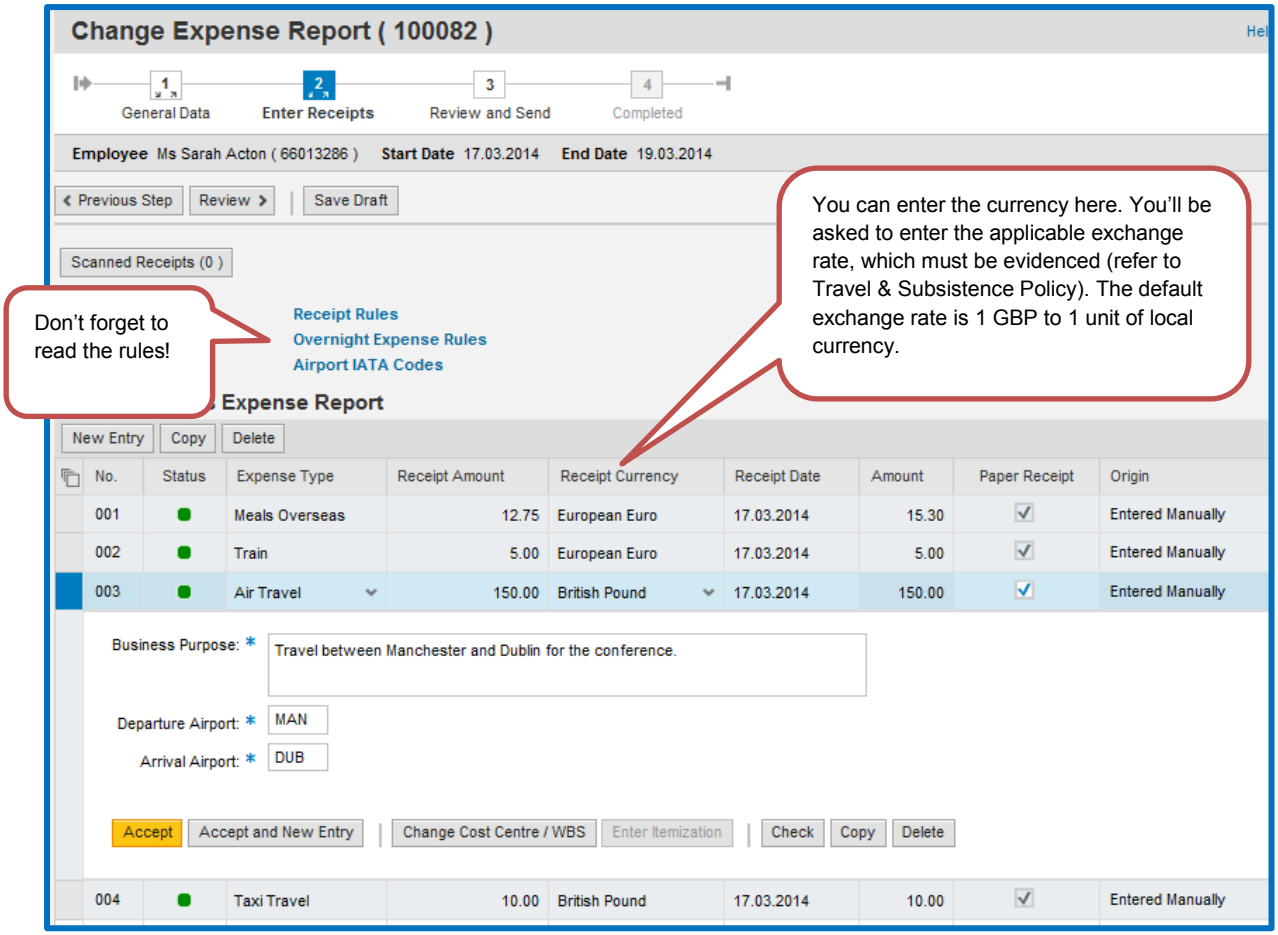
If your claim is for mileage only, there will be no receipts and there is no need to send any paperwork to Payroll.

Claiming any other expenses

To claim non-mileage expenses, select the dates for the trip, then progress to the next screen.



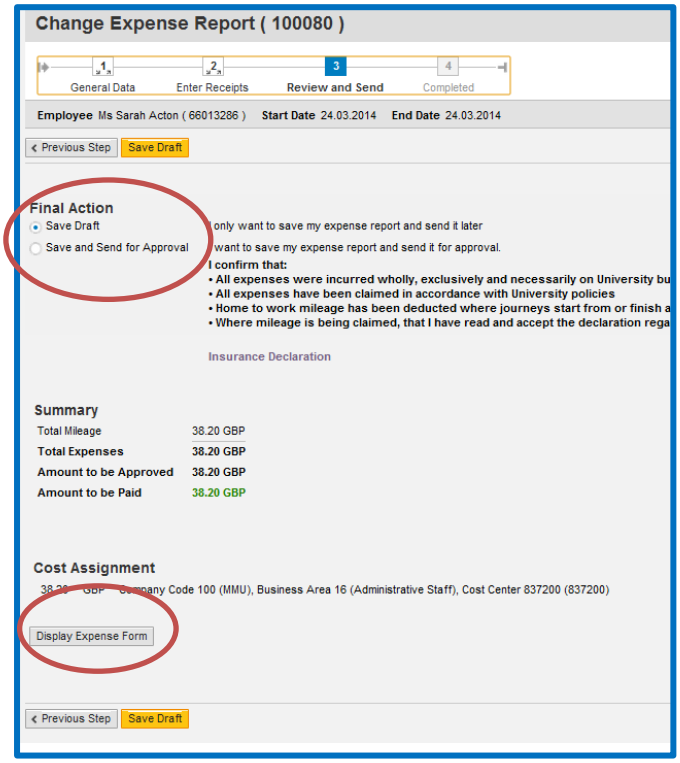
Here, you can enter the detail of the expense claim. In the example below, the employee has been on a trip to Dublin and has claimed for a flight, a train from the airport and a meal.



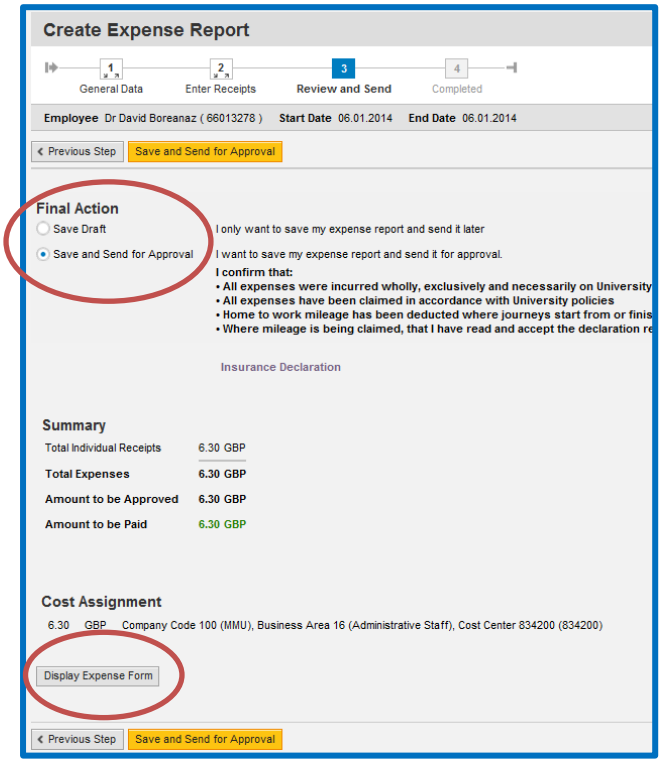
Enter the full business purpose of the journey including the reason for incurring the expenditure. The IATA airport codes should also be entered (e.g. MAN for Manchester). If you are unsure of the code, please follow the link to "Airport IATA Codes". Please record each “leg” of the journey separately, so we can keep track of our carbon footprint.

Click Accept when finished, and then click Review. From the next screen, you must read the submission statements and insurance declaration, before saving as a draft or submitting to your manager for approval.

Save as draft

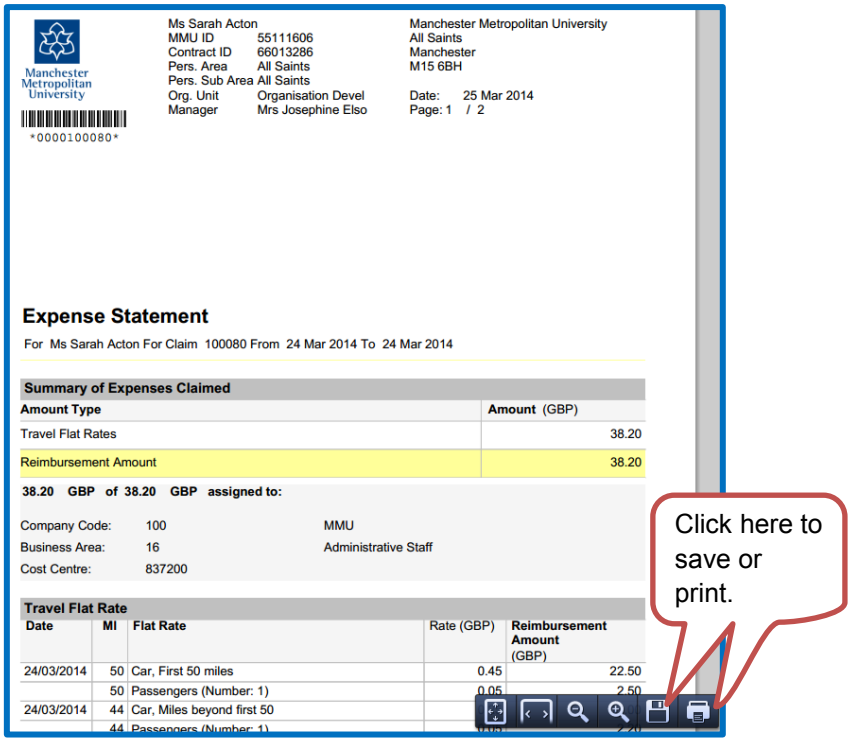

Change Expense Report (100080)
General Data
Enter Receipts
Review and Send
Completed
Employee Ms Sarah Acton (66013286) Start Date 24.03.2014 End Date 24.03.2014
Previous Step
Save Draft
Final Action
Save Draft
Save and Send for Approval
I only want to save my expense report and send it later
I want to save my expense report and send it for approval.
I confirm that:
• All expenses were incurred wholly, exclusively and necessarily on University bu
• All expenses have been claimed in accordance with University policies
• Home to work mileage has been deducted where journeys start from or finish a
• Where mileage is being claimed, that I have read and accept the declaration rega
Insurance Declaration
Summary
Total Mileage 38.20 GBP
Total Expenses 38.20 GBP
Amount to be Approved 38.20 GBP
Amount to be Paid 38.20 GBP
Cost Assignment
Company Code 100 (MMU), Business Area 16 (Administrative Staff), Cost Center 837200 (837200)
Display Expense Form
Previous Step
Save Draft

Save and send for approval

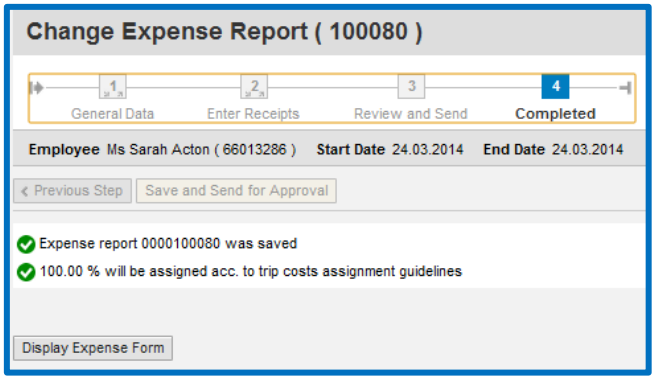

Create Expense Report
General Data
Enter Receipts
Review and Send
Completed
Employee Dr David Boreanaz (66013278) Start Date 06.01.2014 End Date 06.01.2014
Previous Step
Save and Send for Approval
Final Action
Save Draft
Save and Send for Approval
I only want to save my expense report and send it later
I want to save my expense report and send it for approval.
I confirm that:
• All expenses were incurred wholly, exclusively and necessarily on University
• All expenses have been claimed in accordance with University policies
• Home to work mileage has been deducted where journeys start from or finis
• Where mileage is being claimed, that I have read and accept the declaration re
Insurance Declaration
Summary
Total Individual Receipts 6.30 GBP
Total Expenses 6.30 GBP
Amount to be Approved 6.30 GBP
Amount to be Paid 6.30 GBP
Cost Assignment
6.30 GBP Company Code 100 (MMU), Business Area 16 (Administrative Staff), Cost Center 834200 (834200)
Display Expense Form
Previous Step
Save and Send for Approval

When saving or submitting your expense claim, you can display the Expense Summary Statement. This appears as a PDF in a new window, and contains all the information relating to your expense claim. You must print this Expense Summary Statement, attach original receipts, and send to Payroll (Room 301, All Saints Building).

You can save this document for your records, by hovering over the PDF and using the icons. However, it will always remain visible in your myHR area.



When you have submitted your expense claim, you will receive a notification to confirm that the expenses have been sent to your line manager for authorisation.

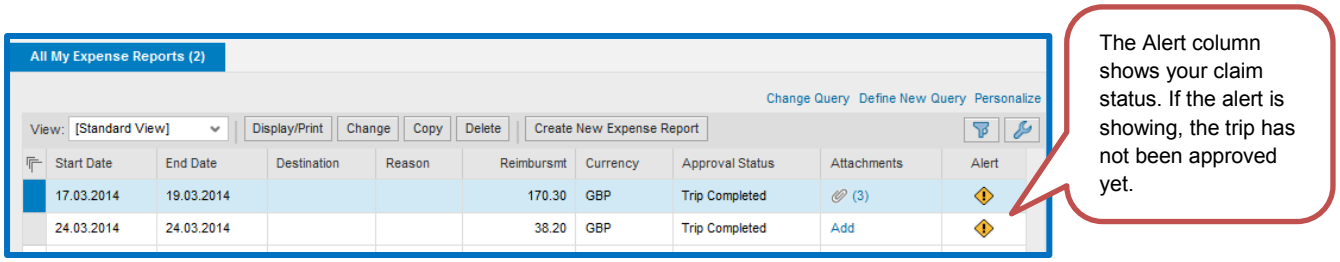

Change Expense Report (100080)
1 General Data
2 Enter Receipts
3 Review and Send
4 Completed
Employee Ms Sarah Acton (66013286) Start Date 24.03.2014 End Date 24.03.2014
Previous Step
Save and Send for Approval
Expense report 0000100080 was saved
100.00 % will be assigned acc. to trip costs assignment guidelines
Display Expense Form

You can now close this window. Please note that the expenses list may not auto-update to display your latest expense claims, so you may need to click the refresh button.

Amending expenses requests before line management approval

To amend your expenses (for example, to add an extra expense), click on Claim Expenses from the homepage.

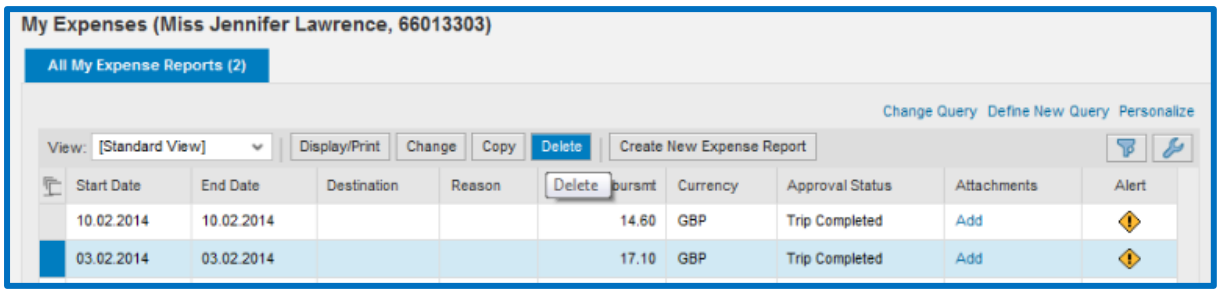
Select the expense you wish to amend by clicking in the box next to it, then clicking the Change button.



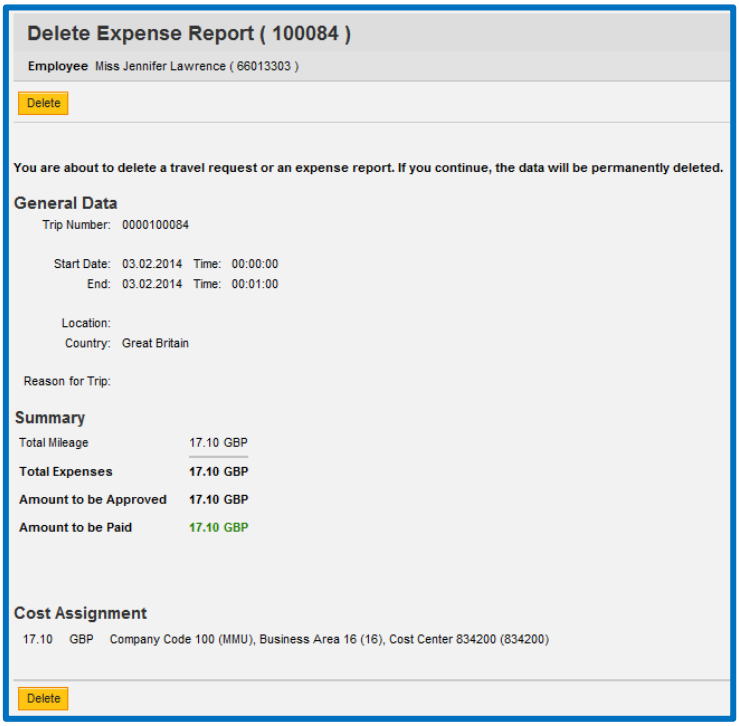
From here, you can enter the expense in the usual way by following the steps above. Ensure that you choose Save and Send for Approval. This will appear in your line manager's Tasks section for their approval, however you will need to bring this to your manager's attention, as the Expenses software does not highlight changed or added items.

Cancelling expenses requests before line management approval

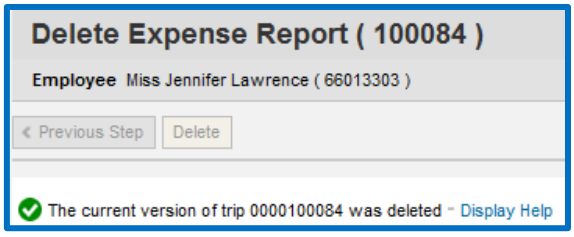
Highlight the expense claim you wish to cancel, and click the Delete button:



A new screen will pop up to confirm the deletion:


Delete Expense Report (100084)
Employee Miss Jennifer Lawrence (66013303)
Delete
You are about to delete a travel request or an expense report. If you continue, the data will be permanently deleted.
General Data
Trip Number: 0000100084
Start Date: 03.02.2014 Time: 00:00:00
End: 03.02.2014 Time: 00:01:00
Location:
Country: Great Britain
Reason for Trip:
Summary
Total Mileage 17.10 GBP
Total Expenses 17.10 GBP
Amount to be Approved 17.10 GBP
Amount to be Paid 17.10 GBP
Cost Assignment
17.10 GBP Company Code 100 (MMU), Business Area 16 (16), Cost Center 834200 (834200)
Delete

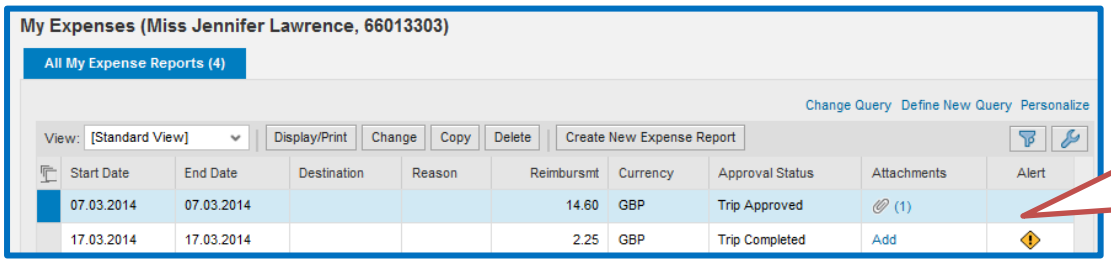
To confirm the deletion, click Delete. A confirmation message will appear.


Delete Expense Report (100084)
Employee Miss Jennifer Lawrence (66013303)
Previous Step
Delete
The current version of trip 0000100084 was deleted - Display Help

The expense claim may still appear in the My Expenses section when you close the window, but will disappear when you refresh the page by clicking on the refresh button at the bottom right of the screen.

Amending or cancelling expense claims after line management approval or rejection

When your expense claims have been approved, they will appear as Trip Approved rather than Trip Completed. To edit approved expense claims, highlight the row you wish to edit and click Change.



Here, you can add in extra expenses in the usual way. This is useful if you have, for example, forgotten to claim a bus ticket. You can also use this to edit claims which have been rejected.

You can also delete elements that you no longer wish to claim, by highlighting the row and clicking “Delete”. When you have finished amending, click Review. On the Review and Send screen, you can either save as a draft or submit to your manager. You will receive a notification to confirm the amendment has been successful.

This will then go back to your line manager for authorisation – even if the net amount is lower than the claim which has already been authorised. You should notify your line manager that you have made amendments, as the system will not automatically notify them.

Amending or cancelling expenses which have already been paid

Occasionally, we may need to amend expense claims once they have been paid. Perhaps a bus ticket was missed off the original claim, which has since been found.

To do this, go to your Expenses area. Highlight the row which you wish to amend or cancel. Expenses which have already been paid will appear as “Trip Settled”, rather than “Trip Completed” or “Trip Approved”.

To add expenses, you can do so in the usual way. Ensure that you submit these to your manager rather than saving them as a draft. These will be processed with the next payroll run. The system knows what it has already paid, so there is no risk of anything being paid twice, even though original items remain in the resubmitted claim.

To delete or remove expense items, again, you can do so by following the steps above. Do this with caution, however – if you remove or cancel expenses which have already been paid, these will be recovered by MMU during the next payroll run.

Rejected claims

If your manager rejects your claim for any reason, you will receive an email to your MMU email account to notify you, which will prompt you to log into myHR to address the issue.

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